#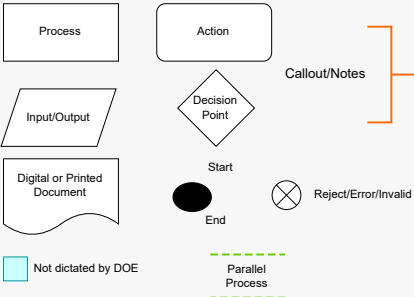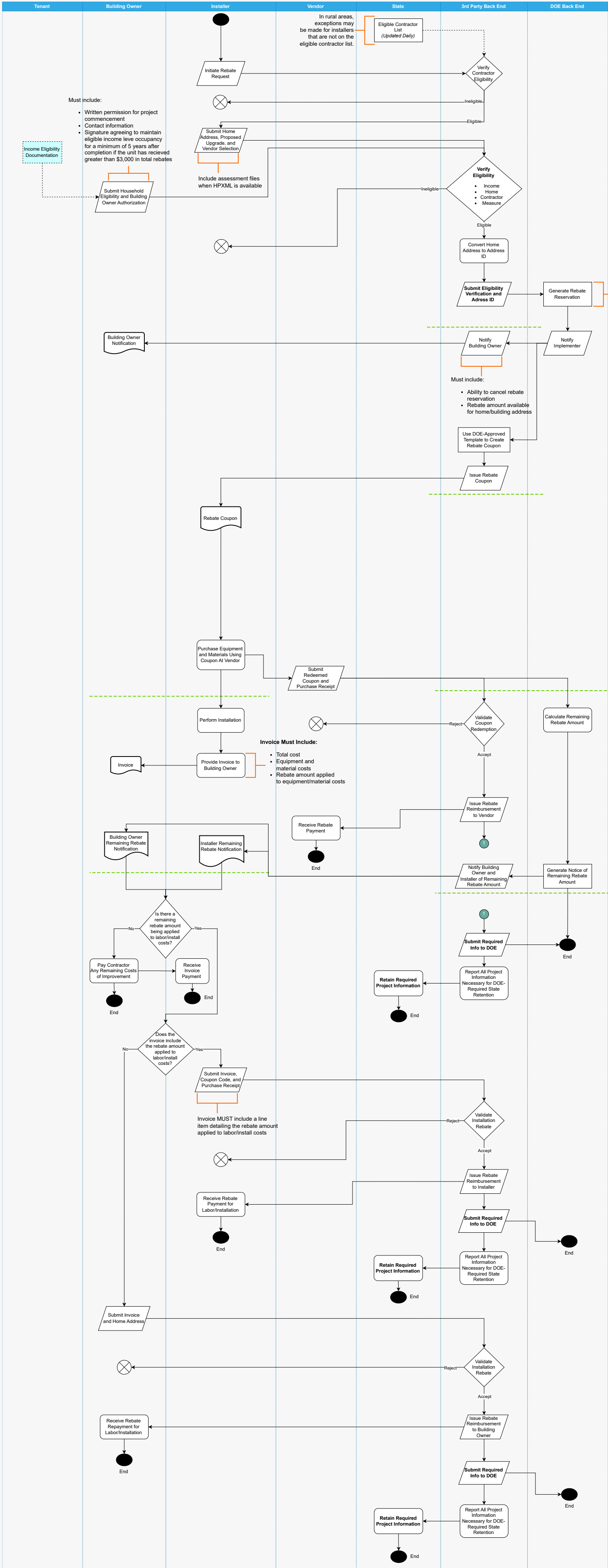 Electrification Rebate Initiated by The Installer with Tenant for Coupon Redemption at Vendor for A Single-Family, Tenant-Occupied Home

Pacific Northwest NATIONAL LABORATORY

Columns: Tenant | Building Owner | Installer | Vendor | State | 3rd Party Back End | DOE Back End

Legend

Columns indicate the entity performing the task described and all associated IT buildout necessary to complete the task.

- Process
- Action
- Input/Output
- Decision Point
- Digital or Printed Document
- Start (End)
- Reject/Error/Invalid
- Not dictated by DOE
- Callout/Notes
- Parallel Process

All **REQUIREMENTS** can be found in the Tools Requirements Document

Process Flow

- **Start**
- Initiate Rebate Request
- In rural areas, exceptions may be made for installers that are not on the eligible contractor list.
- Eligible Contractor List *(Updated Daily)*
- Verify Contractor Eligibility — Ineligible → End ; Eligible →
- Submit Home Address, Proposed Upgrade, and Vendor Selection
  - Include assessment files when HPXML is available
- **Verify Eligibility**
  - Income
  - Home
  - Contractor
  - Measure
  - Ineligible → End ; Eligible →
- Income Eligibility Documentation
- Submit Household Eligibility and Building Owner Authorization

Must include:
- Written permission for project commencement
- Contact information
- Signature agreeing to maintain eligible income leve occupancy for a minimum of 5 years after completion if the unit has recieved greater than $3,000 in total rebates

- Convert Home Address to Address ID
- **Submit Eligibility Verification and Adress ID**
- Generate Rebate Reservation

Notice and coupon must show:
- Approved rebate amount
- Rebate bucket (percentage)
- Product type
- Address ID
- Coupon expiration date
- Notice that eligible entity representatives may be eligible for installation incentives of up to $500, as determined by the state.

If address is in a disadvantaged community, coupon must show that additional installation incentives are available.

- Notify Implementer
- Notify Building Owner
- Building Owner Notification

Must include:
- Ability to cancel rebate reservation
- Rebate amount available for home/building address

- Use DOE-Approved Template to Create Rebate Coupon
- Issue Rebate Coupon
- Rebate Coupon
- Purchase Equipment and Materials Using Coupon At Vendor
- Submit Redeemed Coupon and Purchase Receipt
- Validate Coupon Redemption — Reject → End ; Accept →
- Calculate Remaining Rebate Amount
- Perform Installation

Invoice Must Include:
- Total cost
- Equipment and material costs
- Rebate amount applied to equipment/material costs

- Provide Invoice to Building Owner
- Invoice
- Issue Rebate Reimbursement to Vendor
- Receive Rebate Payment — End
- Generate Notice of Remaining Rebate Amount
- Notify Building Owner and Installer of Remaining Rebate Amount
- Building Owner Remaining Rebate Notification
- Installer Remaining Rebate Notification
- **Submit Required Info to DOE** — End
- Report All Project Information Necessary for DOE-Required State Retention
- **Retain Required Project Information** — End

- Is there a remaining rebate amount being applied to labor/install costs? — No → Pay Contractor Any Remaining Costs of Improvement → End ; Yes → Receive Invoice Payment → End

- Does the invoice include the rebate amount applied to labor/install costs? — No / Yes → Submit Invoice, Coupon Code, and Purchase Receipt

Invoice MUST include a line item detailing the rebate amount applied to labor/install costs

- Validate Installation Rebate — Reject → End ; Accept →
- Issue Rebate Reimbursement to Installer
- Receive Rebate Payment for Labor/Installation — End
- **Submit Required Info to DOE** — End
- Report All Project Information Necessary for DOE-Required State Retention
- **Retain Required Project Information** — End

- Submit Invoice and Home Address
- Validate Installation Rebate — Reject → End ; Accept →
- Issue Rebate Reimbursement to Building Owner
- Receive Rebate Repayment for Labor/Installation — End
- **Submit Required Info to DOE** — End
- Report All Project Information Necessary for DOE-Required State Retention
- **Retain Required Project Information** — End

Only applicable for equipment upgrades that DO NOT require a home assessment

U.S. DEPARTMENT OF ENERGY